2002

Manitoba Potatoes & Other Vegetables Industry Profiles

Manitoba

Building for the Future

104-00296/

CONTENTS

	Pages
- POTATO SECTOR	1
- Potato Sector Profile	2-3
- Potato and Potato Products Sector	4
- Potato Industry Chart	5
- Graphs	6-7
- Trade Maps	8
- OTHER VEGETABLE SECTOR	9
- Vegetable Sector Profile	10-11
- Harvested Area of Vegetables	12
- Marketed Vegetable Yields	13
- Selected Vegetable Marketings	14
- Average Vegetable Prices	15
- Value of Vegetable Production	16
- Fresh and Processed Vegetable Exports	17
- Fresh, Frozen and Processed Vegetable Imports	18
- Vegetable Industry Chart	19
- Graphs	20
- Trade Maps	21

N/A = not available

Data sources: Agriculture and Agri-Food Canada
Manitoba Agriculture and Food
Peak of the Market
Statistics Canada
Manitoba vegetable producers

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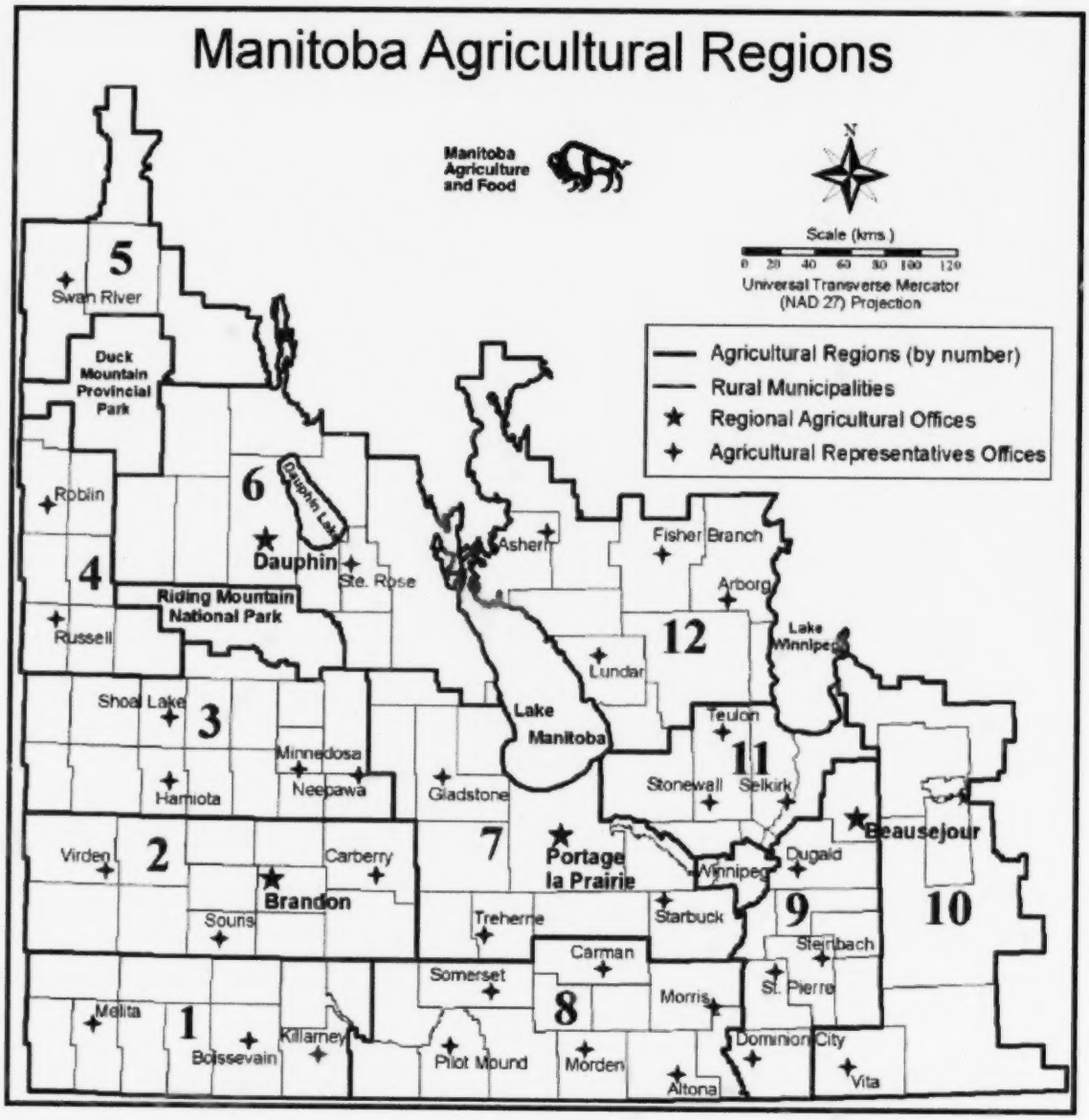
September, 2003



Administrative Region Name	Agricultural Region Numbers
Southwest	1, 2, 3
Northwest	4, 5, 6
Central	7, 8
Eastern/Interlake	9, 10, 11, 12

POTATO SECTOR

POTATO SECTOR PROFILE

Production:

Manitoba's commercial potato industry involves the production of potatoes for the fresh, processing and seed markets and is the second largest in Canada. Potatoes can be grown over a wide range of soils and climatic conditions, but most commercial production is concentrated south and west of Winnipeg in the Portage la Prairie, Winkler-Morden, Treherne, Holland and Carberry areas. Production also takes place in the Selkirk, Melita, Dauphin and Steinbach areas. More than 100 producers of processing potatoes, 37 growers of table stock and 28 seed potato producers employed over 1,500 full-time and casual workers in 2002. Over 27 varieties of potatoes are grown in the province. The table varieties are mainly Reds with some Russets and yellow-fleshed varieties, while the main varieties used for processing are Russet Burbank and Shepody.

Commercial potato production was first recorded in the province in 1908, when 20,800 acres produced 2.3 million cwt. The area planted to potatoes rose to 45,000 acres in 1918, remained mainly in the 30,000-40,000 acre range until the late 1940s, when the seeded area dropped to below 20,000 acres for more than a decade. The over-abundance of grain in the late 1950s and early 1960s encouraged Manitoba producers to look for alternative cash crops and potatoes had potential. Production in the province shifted from Steinbach and north of Winnipeg in the Lockport and Selkirk areas to Portage la Prairie, Carman and Winkler, and then to Holland, Treherne and Carberry. More recently, potato production has expanded to the Melita, Dauphin and Pipestone areas. Over time, the table and seed potato area has increased as new markets were developed in the prairies and Ontario initially and then more recently in Quebec, Illinois, North Dakota, Minnesota, Arkansas, Utah, Texas, California and Wisconsin.

The spring of 2002 was cooler and drier than normal, resulting in delayed emergence with some reduction in crop vigour. This was followed by heavy rains, causing some crop loss. During tuber set and early bulking, the weather turned quite hot and dry, resulting in reduced tubers/plant, yield loss and misshapen tubers. August and the first half of September provided good growing conditions, but rain and very cold harvest conditions resulted in some crop not being harvested and a significant amount of the crop being damaged by frost. In total, approximately 3,000 acres of potatoes were not harvested.

At 85,000 acres, the harvested area in 2002 was 13 percent higher than in 2001. This increase was driven by the french-fry processing industry, with additional acres being planted mainly for the new J.R. Simplot plant in Portage la Prairie. With 20 percent of Canada's potato area in 2002, Manitoba is the second largest producer after Prince Edward Island. While about two-thirds of the existing area of processing potatoes is under irrigation, almost all new potato land will eventually be irrigated.

Marketing:

Of the 16.07 million cwt. of potatoes sold in 2002, 88.5 percent was contracted for processing, 5.8 percent was for table stock and 5.7 percent was sold as certified seed. Wholesalers and processors are attracted to Manitoba's year-round supply of high-grade, consistent quality, good-tasting potatoes. Potato prices averaged below $6/cwt up until 1983, but have ranged between $6.06/cwt and $8.93/cwt in all but two years since then. Seed potato sales in 2002 were similar to 2001 and, even though prices remained strong in the fresh market sector, an increased supply in North America resulted in less volume being sold. The average price in 2002 was a new record, $8.93/cwt, up from the previous record of $8.67/cwt in 2001. The 2002 potato crop was valued at a $143.6 million, 11 percent above the 2001 level. Potatoes contribute about four percent of the total value of agricultural production in the province and two thirds of the value of Manitoba's horticultural production.

Since 1942, various forms of marketing co-operatives have been involved with selling

Manitoba table potatoes. After the establishment of the Manitoba Vegetable Marketing Commission in 1966 and the Manitoba Vegetable Producers' Marketing Board in 1972 (now called Peak of the Market), a modern facility was built, providing warehousing and packaging facilities for potatoes. Peak of the Market employs 45 full-time staff plus some temporary staff. Washed, graded table potatoes are delivered to Peak in bulk trailers or in 50 and 75 lb bags by producers. Bulk product is pre-packed into 5, 10 and 20 lb bags by Peak of the Market. Peak's sales of table potatoes from the 2002 crop declined by 17.6 percent to $16.9 million.

In 2002-03, there were 14.2 million cwt. of Manitoba processing potatoes marketed with a value of $116.1 million. Keystone Vegetable Producers' Association assists growers with price negotiations with the processing companies, such as Midwest Food Products, J.R. Simplot and McCain Foods. Marketing of processed potato products is done by the companies.

A large percentage of the seed potatoes passing inspection were sold to processors. The value of seed potatoes, certified and used or sold for seed, fell to $10.6 million in 2002-03.

Processing:

The five major potato processors in Manitoba are Midwest Food Products (was Nestle-Simplot) (1962) in Carberry, McCain Foods (1977) and J.R. Simplot (2003) in Portage la Prairie and Old Dutch Foods (1956) and Naleway Foods (1940s) in Winnipeg. Potatoes are grown under contract for the processors with the most common variety being Russet Burbank. Two pounds of potatoes are needed to produce one pound of french fries, while almost four pounds of potatoes are used for one pound of potato chips.

Midwest employs over 500 people to process about 650 million lb of potatoes, mainly into frozen french fries, 80 percent of which are sold to fast food chains. Their 140 ft third line blancher is one of the longest in the world. Only about 3-4 percent of Midwest's production goes to the retail market. McCain's processes over 600 million lb of potatoes for fast food chains and the retail market. The province has over half of national french fry production capacity. Manitoba french fries are exported mainly to the USA and Mexico. Other potato products sold by the two plants include potato flakes, hash brown patties, granules, dollar fries, wedge fries and tater gems. Old Dutch's 170 employees were involved in processing 40 million lb of potatoes into Saratoga chips for sale in Canada. Naleway uses about 10 million lb of potatoes for their ethnic food and catering business. Naleway products are marketed in Ontario, Saskatchewan and the USA. J.R Simplot built a $120 million potato-processing plant near Portage la Prairie, which was completed in spring 2003. The plant is expected to employ about 230 people initially to produce up to 300 million lb of french fries and other frozen potato products, but the plant could eventually be expanded to handle double that capacity. Initial annual requirements for raw potatoes will be 600 million lb or about 25,000 acres of potatoes.

Trade:

Manitoba's exports of fresh potatoes, seed potatoes and potato products increased by 15.3 percent to $173.7 million in 2002, $162.0 million of which was processed product. While most of Manitoba's fresh and processed potato exports went to the United States, small amounts of frozen french fries were shipped to Mexico. Other processed potato products were sent to Hong Kong and Taiwan in 2002. Manitoba imported $12.1 million of fresh potatoes, $0.6 million of seed potatoes and $9.1 million of processed potato products in 2002, most of which came from the United States. Potato starch was also imported from the Netherlands.

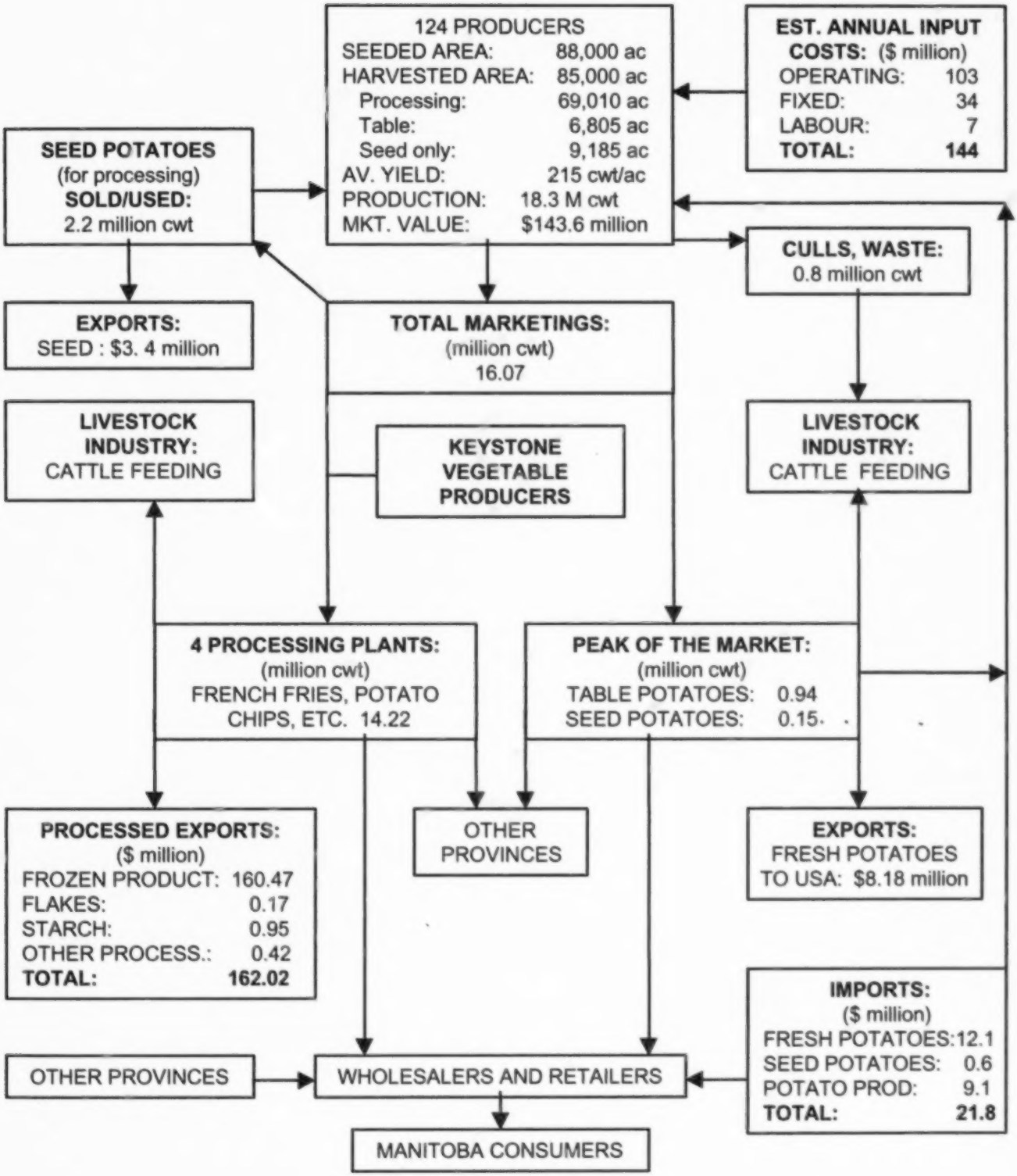
Potential:

With large areas of land suitable for irrigated potato production and the potential for an expanding processing industry, Manitoba could become the largest potato producer in Canada. The limiting factors will be water availability for irrigation, high capital and operating costs to start potato production and the relatively high prices of other irrigated crops. Manitoba producers use the most modern production and storage equipment and techniques available.

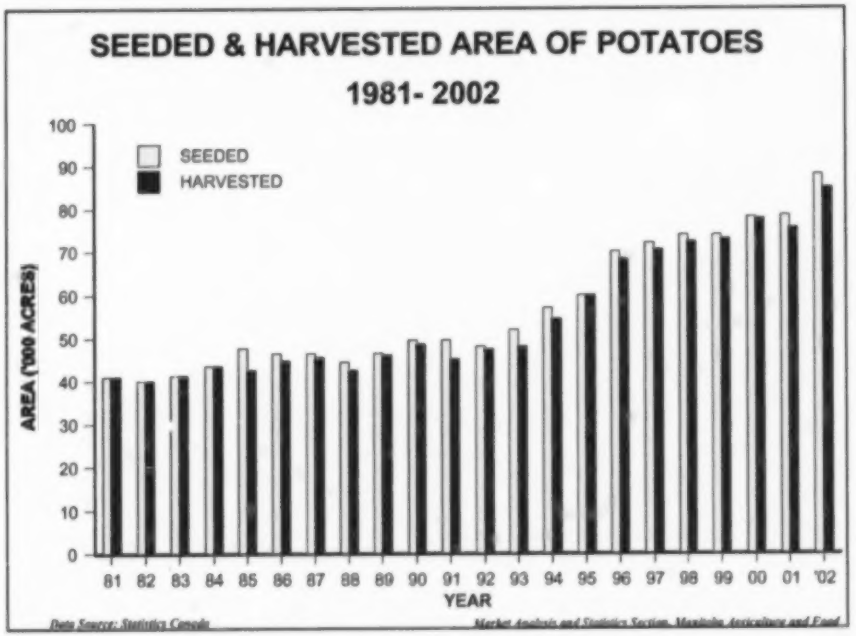
POTATO AND POTATO PRODUCTS SECTOR

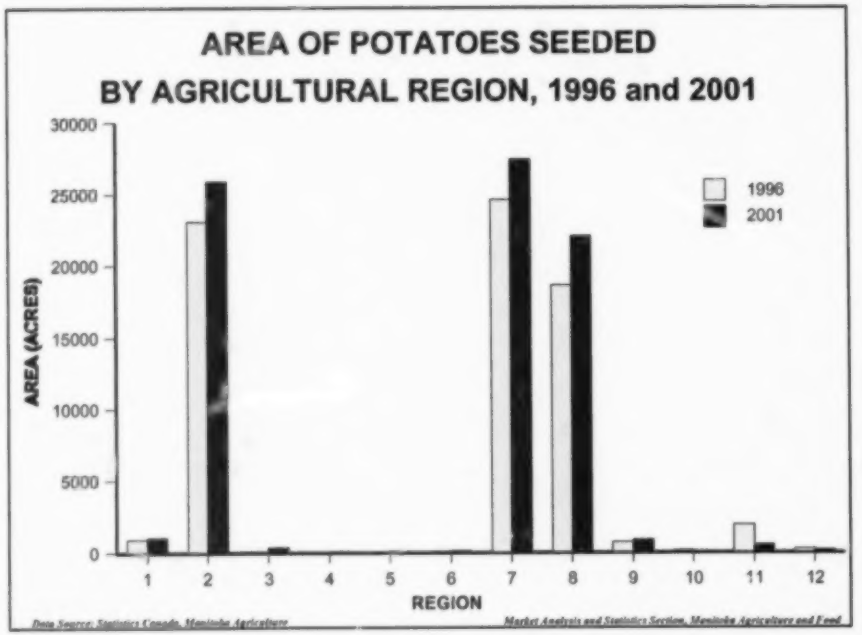
	1999	2000	2001	2002[P]	'02 as a % of '01
Number of Commercial Operations	110	120	120	124	103
CROP PRODUCTION:					
Seeded Area ('000 acres)	74.0	78.0	78.5	88.0	112
% of Canada	18.7	19.1	19.7	20.0	
Irrigated Area ('000 acres)	51.2	55.0	55.6	65.0	117
Harvested Area ('000 acres)	73.0	77.8	75.5	85.0	113
Yield/harvested acre (cwt)	225	238	226	215	95
Total Production (million cwt)	16.4	18.5	17.1	18.3	107
% of Canada	17.4	18.4	19.3	18.0	
Average Price ($/marketed cwt)	8.43	8.49	8.67	8.93	103
VALUE OF PRODUCTION ($ million):	125.0	140.0	129.1	143.6	111
TOTAL EXPENSES: ($/irrigated acre)	1,627	1,670	1,712	1,758	103
CASH RECEIPTS ($ million):	118.6	111.3	131.3	135.5	103
% of Canada	16.9	16.4	18.2	14.3	
CROP DISPOSITION (million cwt):	16.4	18.5	17.1	18.3	107
Marketings	14.8	16.5	14.9	16.1	108
Processing potatoes	12.4	13.8	12.8	14.2	111
Table potatoes	1.5	0.9	0.9	0.9	100
Seed potatoes	0.9	1.7	1.1	0.9	82
Seed (growers' own use)	0.9	1.0	1.2	1.4	117
Culls, Waste	0.7	1.0	1.0	0.8	80
EXPORTS ($ million):	149.6	134.0	150.6	173.7	115
Fresh Potatoes	4.1	3.4	6.1	8.2	134
Processed Potato Products	144.1	128.7	142.8	162.0	113
Seed Potatoes	1.4	1.9	1.7	3.4	205
IMPORTS ($ million):	7.1	10.2	9.4	21.8	232
Fresh Potatoes	1.9	4.5	2.5	12.1	483
Processed Potato Products	4.6	4.2	5.8	9.1	157
Seed Potatoes	0.6	1.4	1.1	0.6	55

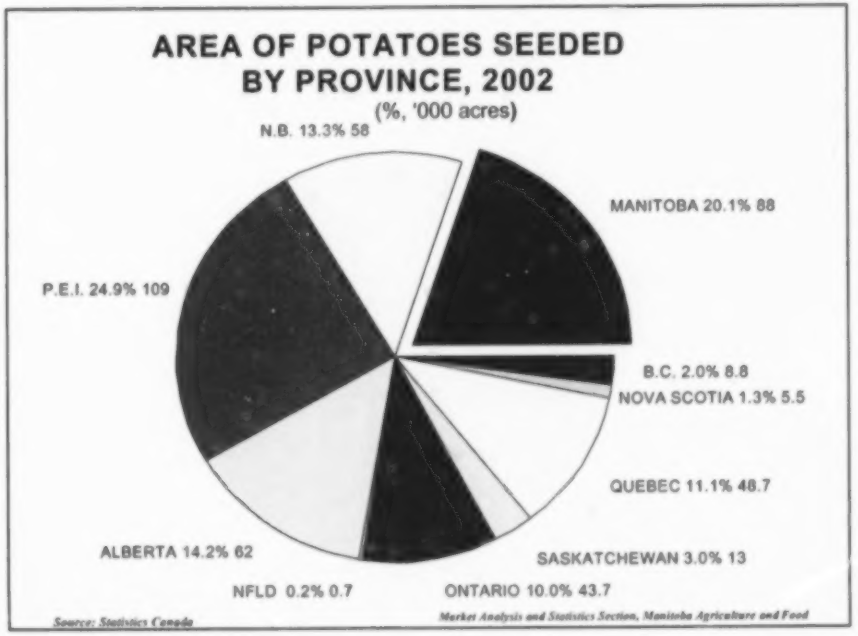
POTATO INDUSTRY CHART, 2002

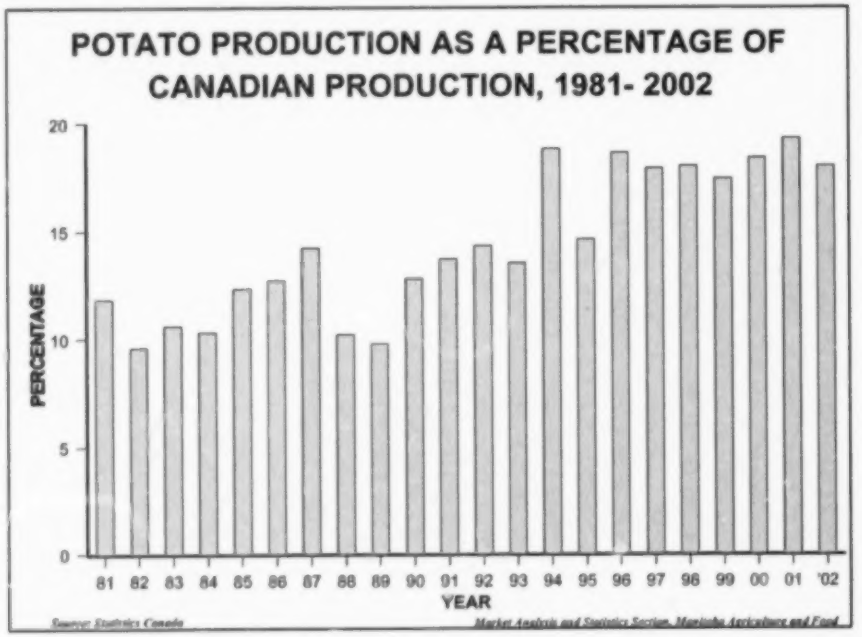


DATA SOURCE: Manitoba Agriculture and Food, Statistics Canada, Peak of the Market, Canadian Food Inspection Agency

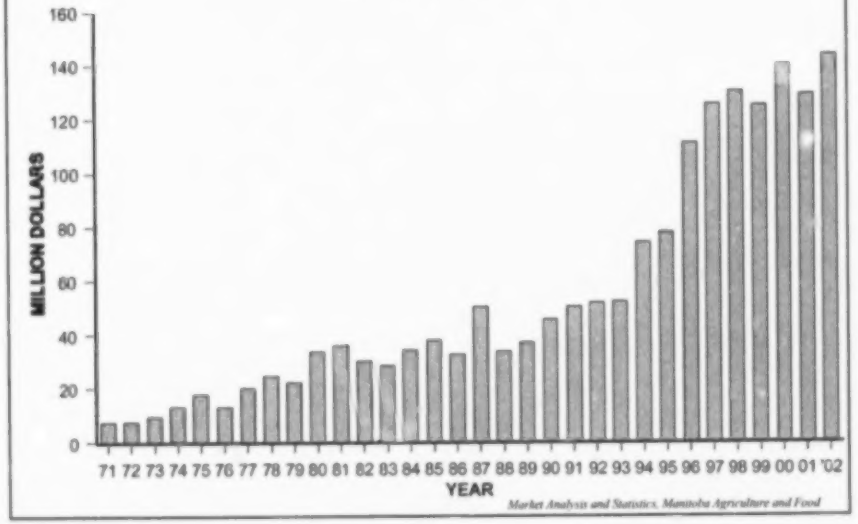

SEEDED & HARVESTED AREA OF POTATOES
1981- 2002
SEEDED
HARVESTED
AREA ('000 ACRES)
100
90
80
70
60
50
40
30
20
10
0
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 00 01 '02
YEAR
Data Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


AREA OF POTATOES SEEDED
BY AGRICULTURAL REGION, 1996 and 2001
1996
2001
AREA (ACRES)
30000
25000
20000
15000
10000
5000
0
1 2 3 4 5 6 7 8 9 10 11 12
REGION
Data Source: Statistics Canada, Manitoba Agriculture
Market Analysis and Statistics Section, Manitoba Agriculture and Food


AREA OF POTATOES SEEDED
BY PROVINCE, 2002
(%, '000 acres)
N.B. 13.3% 58
MANITOBA 20.1% 88
P.E.I. 24.9% 109
B.C. 2.0% 8.8
NOVA SCOTIA 1.3% 5.5
QUEBEC 11.1% 48.7
ALBERTA 14.2% 62
SASKATCHEWAN 3.0% 13
NFLD 0.2% 0.7
ONTARIO 10.0% 43.7
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

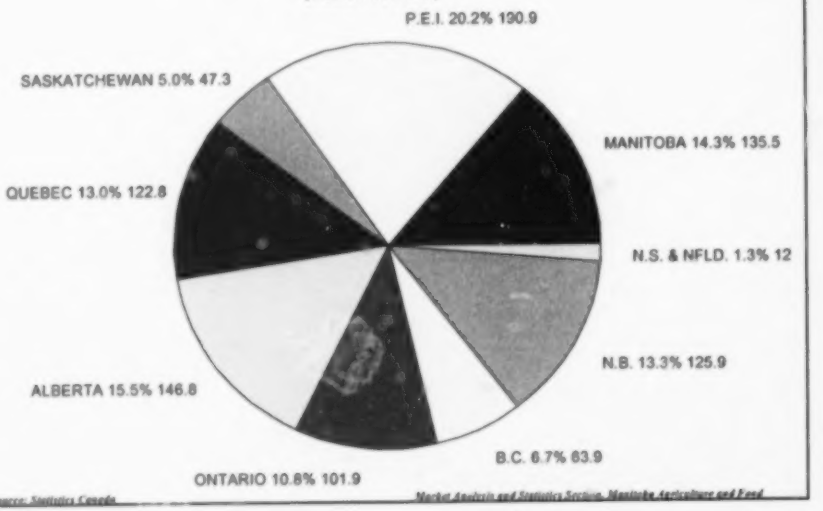

POTATO PRODUCTION AS A PERCENTAGE OF
CANADIAN PRODUCTION, 1981- 2002
PERCENTAGE
20
15
10
5
0
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 00 01 '02
YEAR
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

FARM VALUE OF POTATO PRODUCTION 1971- 2002



Market Analysis and Statistics, Manitoba Agriculture and Food

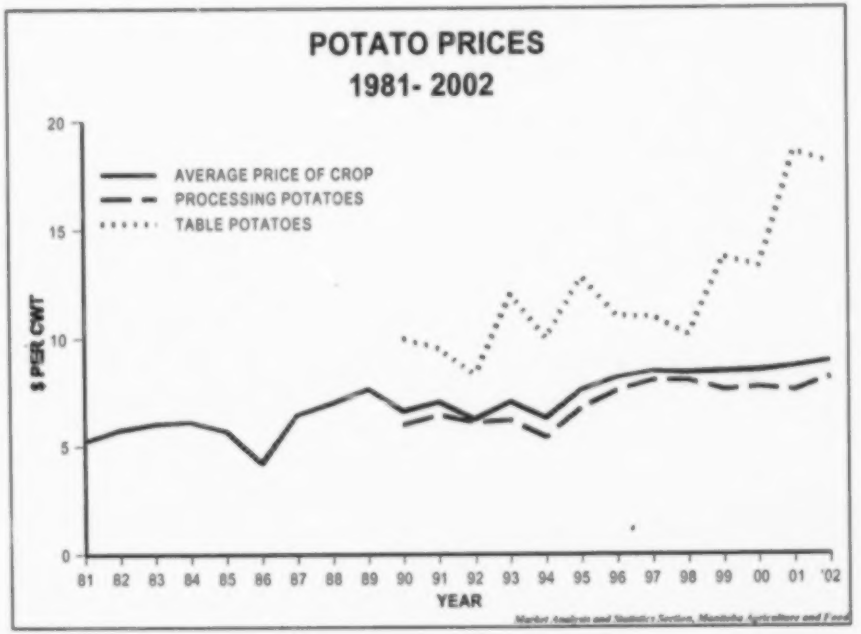
FARM CASH RECEIPTS FROM POTATOES BY PROVINCE, 2002



Source: Statistics Canada

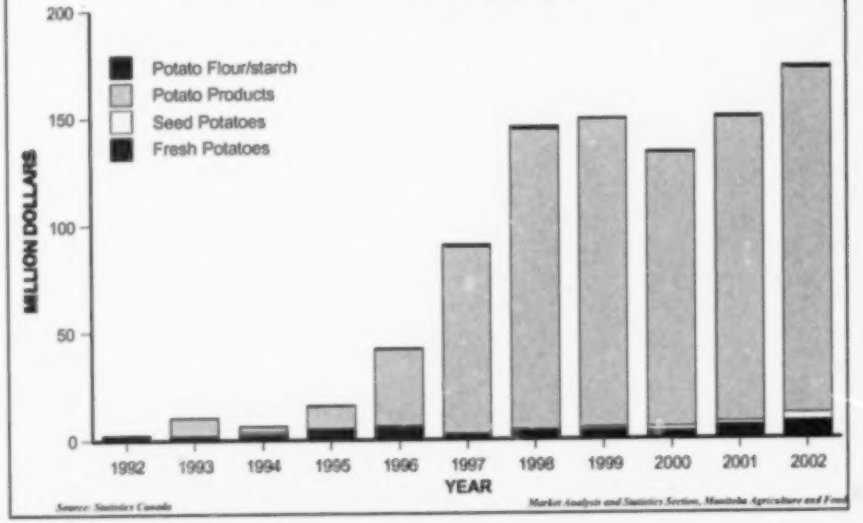
Market Analysis and Statistics Section, Manitoba Agriculture and Food

POTATO PRICES 1981- 2002



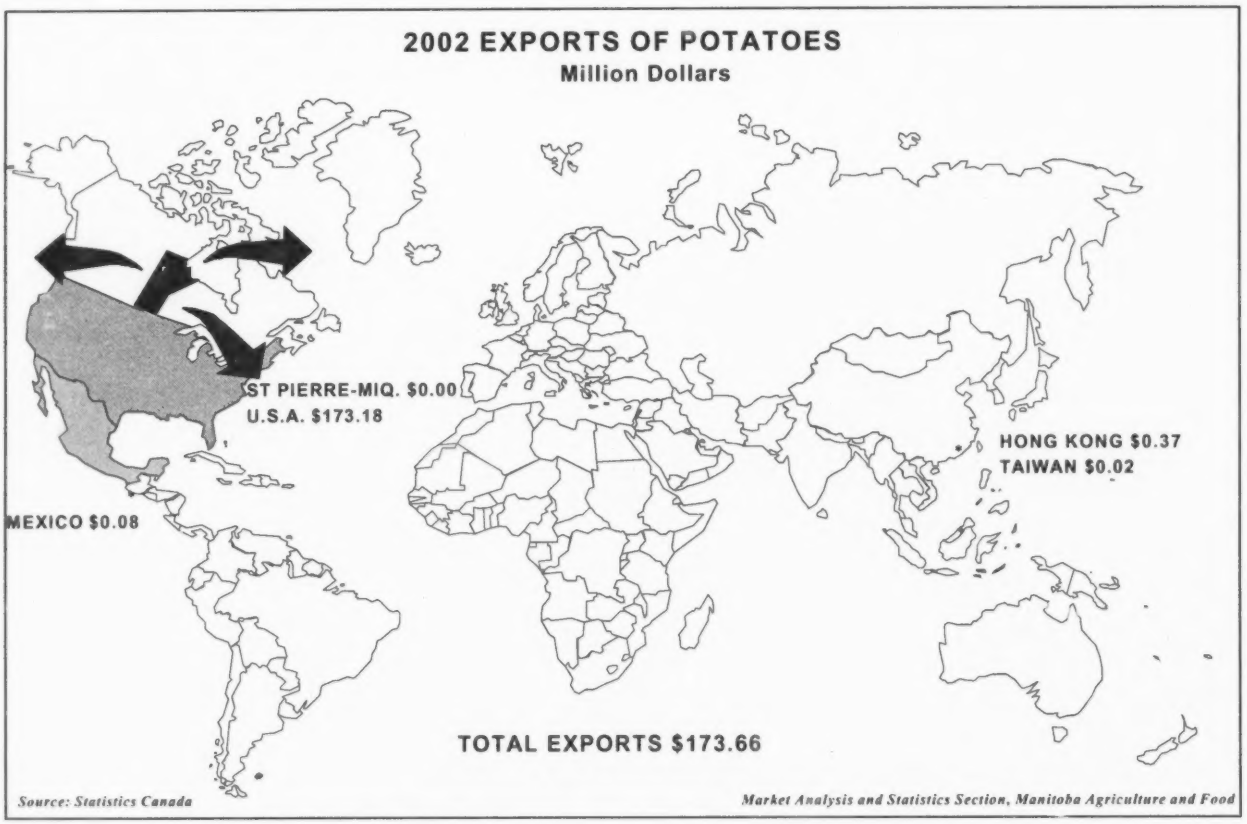
Market Analysis and Statistics Section, Manitoba Agriculture and Food

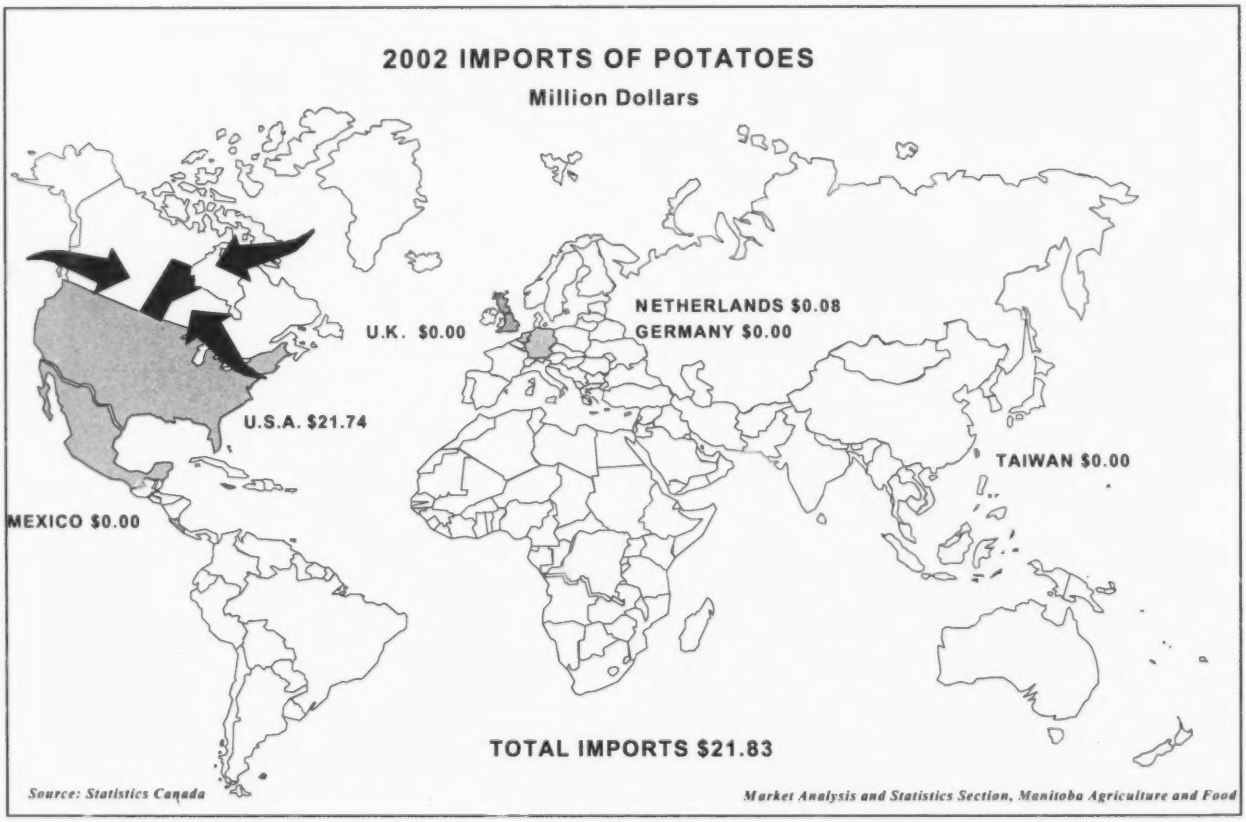
MANITOBA POTATO AND PRODUCT EXPORTS TO OTHER COUNTRIES, 1992- 2002



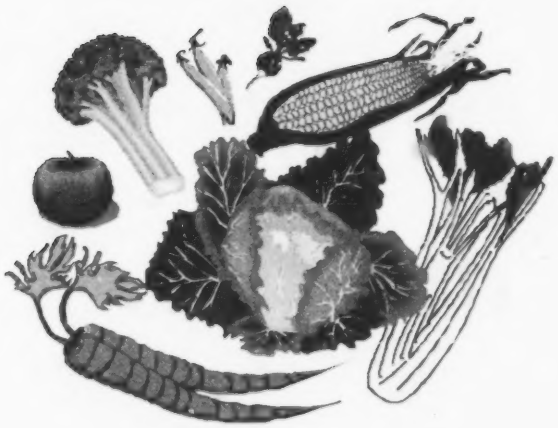
Source: Statistics Canada

Market Analysis and Statistics Section, Manitoba Agriculture and Food


2002 EXPORTS OF POTATOES
Million Dollars
ST PIERRE-MIQ. $0.00
U.S.A. $173.18
MEXICO $0.08
HONG KONG $0.37
TAIWAN $0.02
TOTAL EXPORTS $173.66
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


2002 IMPORTS OF POTATOES
Million Dollars
U.K. $0.00
NETHERLANDS $0.08
GERMANY $0.00
U.S.A. $21.74
MEXICO $0.00
TAIWAN $0.00
TOTAL IMPORTS $21.83
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

OTHER VEGETABLE SECTOR



VEGETABLE SECTOR PROFILE

Production:

Manitoba's commercial vegetable industry involves the production of vegetables for the fresh market with small amounts being processed. Although of increasing importance to the Manitoba economy, the industry is still relatively small compared to the major producing provinces of Ontario, Quebec and British Columbia. There are about 24 major commercial vegetable producers and about 235 market gardeners in Manitoba who employed close to 2,000 full-time and seasonal farm workers. Most commercial production is concentrated west, south and north of Winnipeg in the Portage la Prairie, Marquette, Winkler, East St. Paul and Emerson areas. Almost all the vegetable land is irrigated so generally is located close to rivers or aquifers. Over 110 different types of vegetables are grown ranging from asparagus to zucchini, the most important being carrots, onions, cauliflower, cabbage, sweet corn and broccoli.

Early settlers in the province had home vegetable gardens and in many cases, excess produce was sold. Commercial vegetable production was first recorded in Manitoba in 1936, when about $1.5 million of produce was sold. The area planted to vegetables destined for the fresh market was 2,200 acres in 1947, while 250 acres of vegetables were used for processing. The non-commercial vegetable area was estimated at 1,116 acres. The vegetable area increased in the mid-1950s to over 3,000 acres for the fresh market and over 1,000 acres for processing. Interest in vegetable production declined in the mid-1960s, but rose again in the late 1970s, from which time between 4,000 and 6,000 acres have been planted to vegetables each year.

In 2002, 4,810 acres of vegetables were seeded for commercial production, of which 4,710 acres were harvested. Interest in Oriental vegetable production continued in 2002. Market opportunities allowed for a larger area of various oriental crops, including *bok choy, Chinese cabbage, Chinese broccoli (gai lahn), yu choy, hot peppers, eggplants, Shanghai bok choy, fu gua (bitter melon), Chinese watermelon/ muskmelon, long beans, baby bok choy, watercress and daikon/lo bok (Japanese radish/Chinese radish*).

The 2002 production and marketing season for Manitoba's vegetable industry was far from a banner year. Cool, wet spring conditions slowed growth and contributed to crop losses. The gain in growth resulting from the warm and drier conditions during the summer months was countered by early frosts in September and heavy frosts in early October. Growers felt that at least a month of the production season was lost because of unfavourable weather conditions.

As a result of weather conditions, overall yields of vegetable crops were generally down. For crops such as broccoli, green onions, carrots and cooking onions, growers experienced yield reductions by as much as 25 percent. Obviously, supply availability became an issue impacting both price and volumes of commodities (particularly jumbo carrots and potatoes) shipped to the United States. Domestically, the quality of marketed commodities was considered good with prices generally unchanged from past years.

Marketing:

Vegetable producers marketed about 70.2 million lb of produce from the 2002 crop valued at $20.78 million, compared to 81.3 million lb and $20.36 million for the 2001 crop.

Manitoba-grown vegetables were sold throughout Manitoba, Saskatchewan and into Alberta, Ontario and the United States.

Since 1942, various forms of marketing co-operatives have been involved with selling Manitoba fresh vegetables. After the establishment of the Manitoba Vegetable Marketing Commission in 1966 and the Manitoba Vegetable Producers' Marketing Board in 1972 (now called Peak of the Market), a modern facility was built, providing warehouse facilities for vegetables. Almost all vegetable farms now have their own washing, grading and packaging facilities. Vegetables are washed, graded and packed into bulk containers or consumer-sized bags by producers before being delivered to Peak of the Market. Peak employs 45 full-time staff plus some temporary staff. Peak sells the vegetables under the "Peak of the Market" label to wholesalers and retailers in Manitoba and other provinces as well as to the United States and a few other countries. Wholesalers and processors are attracted to Manitoba's high-grade, consistent quality, flavourful vegetables, some of which are available almost year-round, such as onions, carrots, beets and parsnips. Manitoba growers have one of the most technologically advanced storage programs in North America.

About one quarter of Manitoba's commercially-produced vegetables are marketed by producers directly to wholesalers and retailers in Manitoba, Saskatchewan, Alberta and the United States or to consumers through farmers' markets and roadside stands.

There are ten vegetable wholesalers in Manitoba which distribute imported and locally-produced vegetables.

Processing:

Commercial vegetable processing in Manitoba, which began with canning peas in 1924 and pickling a few tons of produce in 1933, expanded in 1945 in Winkler and in 1946 in Winnipeg to include additional canned vegetables, such as peas, beans and spinach. Further expansion took place in 1952, with a new canning plant in Morden which processed peas, beans, corn and tomatoes, and again in 1956 in Winnipeg, when root crops were used in the processing of diced vegetables and in vegetable stew products. Campbell Food's soup plant opened in Portage la Prairie in 1960 and for 30 years was the major vegetable processor in the province. Since Campbell's closed in 1990, no canning or freezing of vegetables has been done on a large commercial scale in Manitoba.

Crocus Foods Ltd. of Portage la Prairie, the only processor of fresh vegetable products in Manitoba, closed in 2002.

Trade:

Manitoba exported close to $2.8 million of fresh and prepared vegetables in 2002, mainly fresh onions, carrots, cabbage, asparagus, cauliflower and broccoli. Almost all of these fresh vegetable exports were to the United States with small amounts going to Mexico. Very small amounts of processed product were shipped to the United States and two other countries.

Because of the climate, Manitoba has to import from other provinces and countries a large portion of the non-storable fresh vegetables consumed in the province. Imports of fresh, frozen and processed vegetables from the United States, Mexico and 25 other countries amounted to $51.6 million in 2002, of which about $41.3 million was fresh product.

HARVESTED AREA OF VEGETABLES

	1999	2000	2001	2002	2002 as a % of 2001
NUMBER OF FARMS:					
Major Commercial Farms	20	25	25	24	96
Market Gardeners	280	230	235	235	100
SEEDED AREA (acres):	**4,630**	**4,478**	**4,652**	**4,810**	**103**
HARVESTED AREA (acres):	**4,600**	**4,418**	**4,519**	**4,590**	**102**
Asparagus	110	115	120	115	96
Beans, green/wax	100	90	80	40	50
Beets	45	45	60	45	75
Broccoli	375	350	370	360	97
Cabbage	400	460	425	420	99
Carrots	755	740	720	735	102
Cauliflower	500	480	490	490	100
Celery (est.)	120	120	125	120	96
Corn, sweet	700	670	800	750	94
Cucumber	125	135	150	155	103
Lettuce	255	175	134	145	108
Onions, all dry (excl. sets)	420	433	520	530	102
Onions, green	40	40	40	30	75
Parsnips	45	55	50	50	100
Peas, green	70	70	80	40	50
Peppers	30	45	60	40	67
Radish	45	45	48	40	83
Rutabagas	25	30	27	60	222
Squash/Pumpkins	135	105	110	160	145
Tomatoes	20	25	30	30	100
Other Vegetables	85	75	80	235	294

MARKETED VEGETABLE YIELDS

	1999	2000	2001	2002	2002 as a % of 2001
YIELD ('000 lb/acre):					
Asparagus	2.9	3.1	2.9	2.9	100
Beans, green/wax	2.6	2.2	2.3	3.8	165
Beets	12.0	10.4	10.0	13.8	138
Broccoli	6.9	14.3	11.1	10.2	92
Cabbage	24.8	12.0	25.9	26.2	101
Carrots	25.2	24.3	26.4	23.8	90
Cauliflower	10.8	7.5	10.2	9.9	97
Celery (est.)	12.5	13.3	29.6	20.0	68
Corn, sweet	4.4	6.7	8.8	5.3	60
Cucumber	12.7	14.3	14.7	12.9	88
Lettuce	7.8	13.0	11.9	11.4	96
Onions, all dry (excl. sets)	35.6	32.5	34.9	27.5	79
Onions, green	38.3	48.8	37.5	51.7	138
Parsnips	13.8	14.6	15.6	14.4	92
Peas, green	0.7	1.0	3.0	1.5	50
Peppers	11.7	5.6	10.0	13.8	138
Radish	8.2	3.0	7.9	6.5	82
Rutabagas	19.6	13.3	25.9	32.5	125
Squash/Pumpkins	12.1	16.2	34.1	13.8	40
Tomatoes	7.0	4.0	16.7	3.5	21

SELECTED VEGETABLE MARKETINGS

	1999	2000	2001	2002	2002 as a % of 2001
MARKETINGS ('000 lb):	**67,340**	**63,970**	**81,320**	**70,160**	**86**
Asparagus	320	355	350	335	96
Beans, green/wax	260	200	180	150	83
Beets	540	470	600	620	103
Broccoli	2,600	5,000	4,100	3,660	89
Cabbage	9,900	5,500	11,000	11,000	100
Carrots	19,000	18,000	19,000	17,500	92
Cauliflower	5,400	3,600	5,000	4,850	97
Celery	1,500	1,600	3,700	2,400	65
Corn, sweet	3,100	4,500	7,000	4,000	57
Cucumber	1,590	1,925	2,200	2,000	91
Lettuce	2,000	2,270	1,600	1,650	103
Onions, all dry (excl. sets)	14,110	14,065	18,140	14,600	80
Onions, green	1,530	1,950	1,500	1,550	103
Parsnips	620	800	780	720	92
Peas, green	50	70	240	60	25
Peppers	350	250	600	550	92
Radish	370	135	380	260	68
Rutabagas	490	400	700	1,950	279
Squash/Pumpkins	1,630	1,700	3,750	2,200	59
Tomatoes	140	100	500	105	21

AVERAGE VEGETABLE PRICES

	1999	2000	2001	2002	2002 as a % of 2001
AVERAGE PRICE ($/lb):					
Asparagus	1.40	1.58	1.50	1.58	105
Beans, green/wax	0.63	0.68	0.61	0.73	120
Beets	0.31	0.34	0.34	0.36	106
Broccoli	0.39	0.35	0.30	0.37	123
Cabbage	0.13	0.16	0.18	0.20	111
Carrots	0.177	0.21	0.21	0.24	114
Cauliflower	0.34	0.46	0.36	0.36	100
Celery	0.25	0.26	0.20	0.18	90
Corn, sweet	0.25	0.25	0.25	0.40	160
Cucumber	0.20	0.26	0.23	0.22	96
Lettuce	0.26	0.26	0.40	0.40	100
Onions, cooking/Spanish	0.11	0.14	0.17	0.24	141
Onions, green	0.35	0.39	0.35	0.42	120
Parsnips	0.74	0.88	0.75	0.82	109
Peas, green	1.15	1.20	1.50	1.70	113
Peppers	0.40	0.42	0.40	0.45	113
Radish	0.48	0.50	0.60	0.65	108
Rutabagas	0.18	0.27	0.26	0.24	92
Squash/Pumpkins	0.20	0.19	0.24	0.21	88
Tomatoes	0.42	0.75	0.75	0.62	83

VALUE OF VEGETABLE PRODUCTION

	1999	2000	2001	2002	2002 as a % of 2001
VALUE OF PROD. ($'000)	**14,970**	**16,600**	**20,360**	**20,780**	**102**
Asparagus	450	560	525	530	101
Beans, green/wax	165	135	110	110	100
Beets	165	160	205	220	107
Broccoli	1,000	1,750	1,230	1,350	110
Cabbage	1,290	880	1,980	2,200	111
Carrots	3,300	3,800	3,990	4,200	105
Cauliflower	1,850	1,650	1,800	1,750	97
Celery	375	420	740	430	58
Corn, sweet	770	1,125	1,750	1,600	91
Cucumber	320	500	505	440	87
Lettuce	520	590	640	660	103
Onions, all dry (excl. sets)	1,640	2,062	3,175	3,550	112
Onions, green	535	760	525	650	124
Parsnips	460	700	585	590	101
Peas, green	60	84	360	100	28
Peppers	140	105	240	250	104
Radish	177	67	230	170	74
Rutabagas	90	110	180	470	261
Squash/Pumpkins	260	312	915	470	51
Tomatoes	60	75	375	65	17
Other Vegetables	150	125	300	975	325

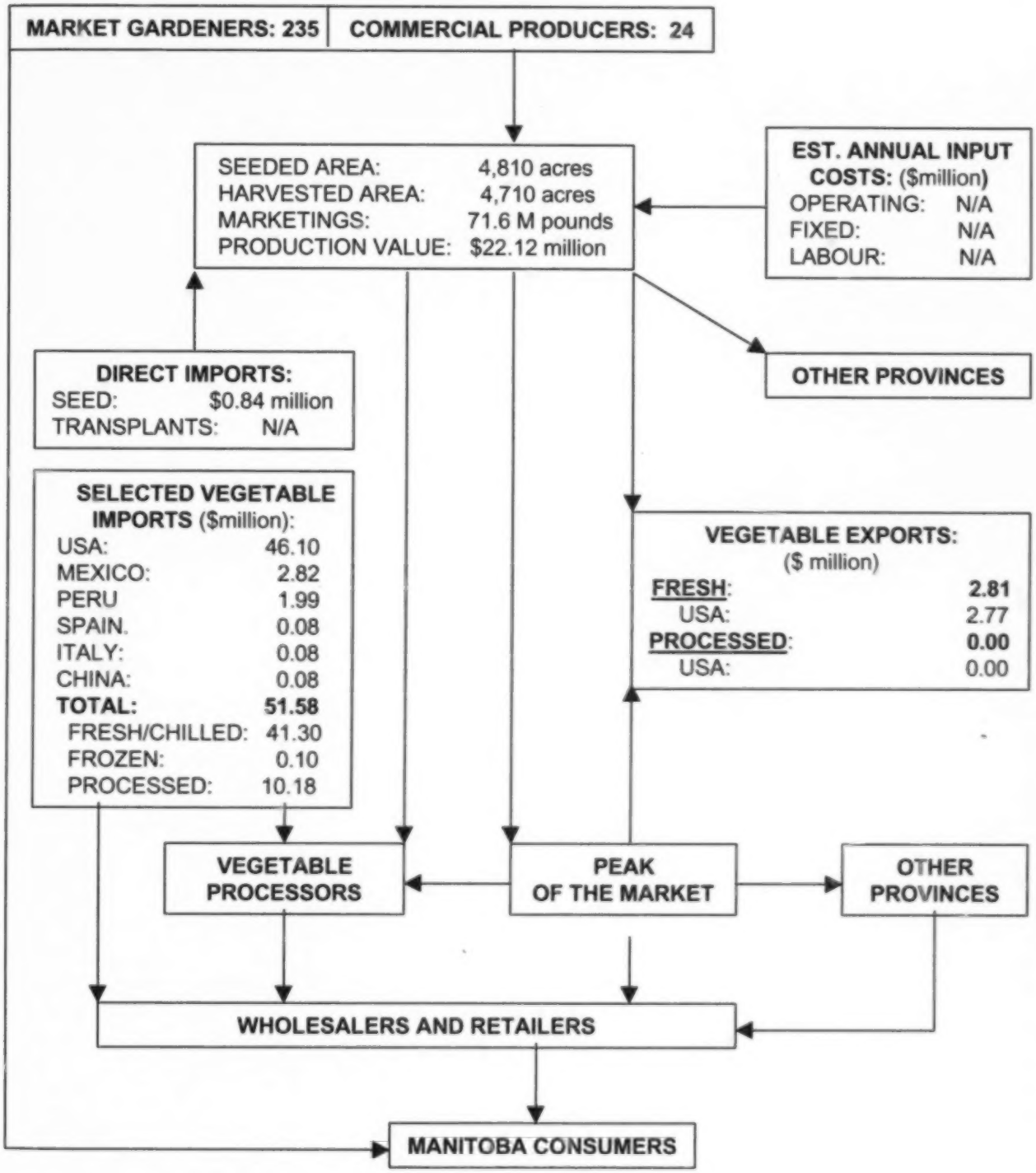
FRESH AND PROCESSED VEGETABLE EXPORTS

	1999	2000	2001	2002	2002 as a % of 2001
EXPORTS ($ thousand):	**2,927.8**	**2,743.1**	**3,675.6**	**2,810.4**	**76**
Asparagus	13.0	0	3.8	48.9	1287
Beans, green/wax	131.8	75.7	172.7	19.5	11
Beets/Radishes/Parsnips	45.9	14.6	110.1	32.6	30
Cabbage	517.5	305.9	149.4	62.4	42
Carrots/Rutabagas	316.8	249.9	238.5	67.7	28
Cauliflower/Broccoli	404.3	246.9	143.1	34.1	24
Celery	0	0	0	0	-
Corn, sweet	0	49.9	0	0	-
Cucumber	25.5	7.6	124.0	62.9	51
Onions	1,327.5	1,656.6	2,651.9	2,409.9	91
Peas, green	15.7	0	18.8	10.5	56
Peppers	0	0	0	4.7	-
Other fresh vegetables	129.8	136.0	63.3	57.2	90

FRESH, FROZEN AND PROCESSED VEGETABLE IMPORTS

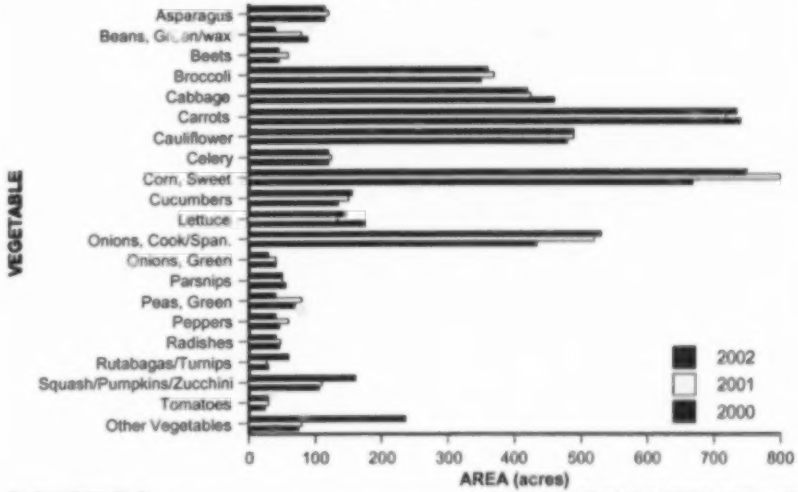
	1999	2000	2001	2002	2002 as a % of 2001
IMPORTS ($ million):	**43.2**	**45.2**	**51.5**	**51.6**	**100**
Asparagus	0.9	1.2	1.8	2.7	150
Beans, green/wax	1.5	1.0	0.8	1.0	125
Beets/Radishes/Parsnips	0.6	0.7	0.6	0.5	89
Cabbage	2.4	2.8	2.9	2.6	90
Carrots/Rutabagas	2.7	2.2	2.5	2.5	100
Cauliflower/Broccoli	1.2	1.3	1.3	1.1	88
Celery	1.1	1.5	1.3	1.1	82
Corn, sweet	1.4	0.8	0.2	0.1	50
Cucumber	2.1	1.8	1.0	0.8	78
Lettuce	6.6	8.0	8.5	8.0	95
Onions	1.4	1.5	2.1	1.7	81
Peas, green	0.7	0.5	0.4	0.3	75
Peppers	2.3	3.0	3.3	4.0	122
Spinach	0.5	0.6	0.9	0.9	93
Tomatoes	9.9	11.1	15.0	17.1	114
Selected Other Vegetables	7.9	7.2	9.0	7.2	80

VEGETABLE INDUSTRY CHART, 2002



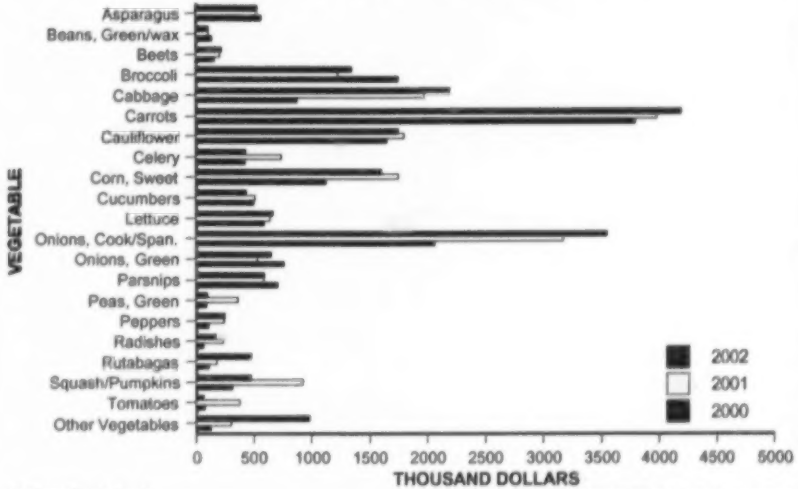
DATA SOURCE: Peak of the Market, Manitoba vegetable producers, Manitoba Agriculture and Food, Statistics Canada, Agriculture & Agri-Food Canada

HARVESTED AREA BY TYPE OF VEGETABLE 2000- 2002



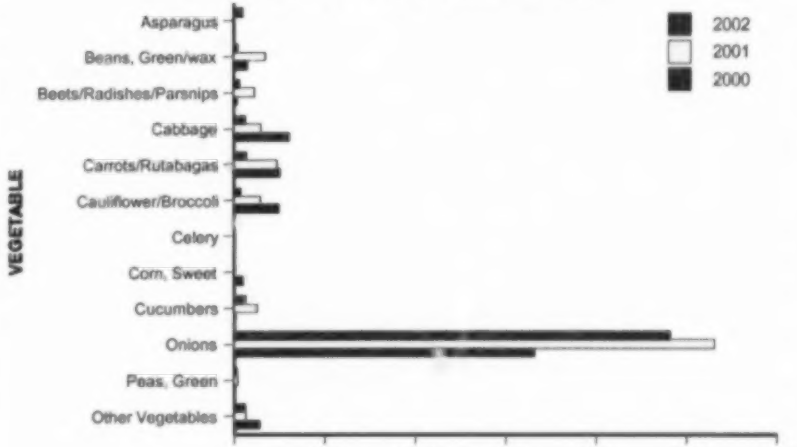
Data Source: Statistics Canada — Market Analysis and Statistics Section, Manitoba Agriculture and Food

FARM VALUE OF VEGETABLE PRODUCTION BY TYPE, 2000- 2002



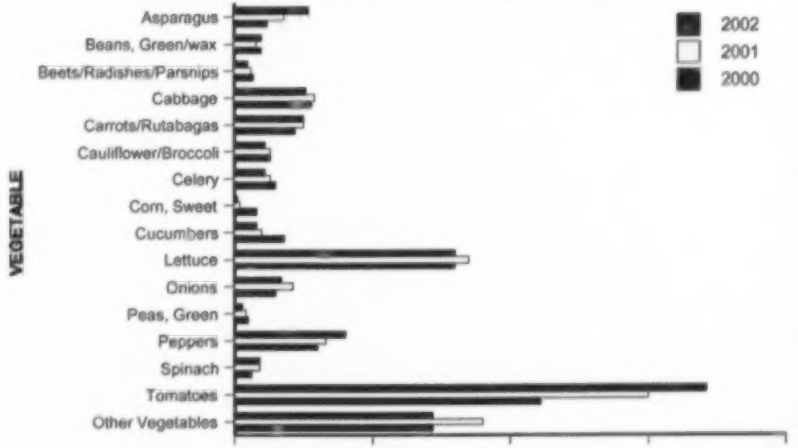
Data Source: Statistics Canada — Market Analysis and Statistics Section, Manitoba Agriculture and Food

FRESH AND FROZEN VEGETABLE EXPORTS BY TYPE, 2000- 2002

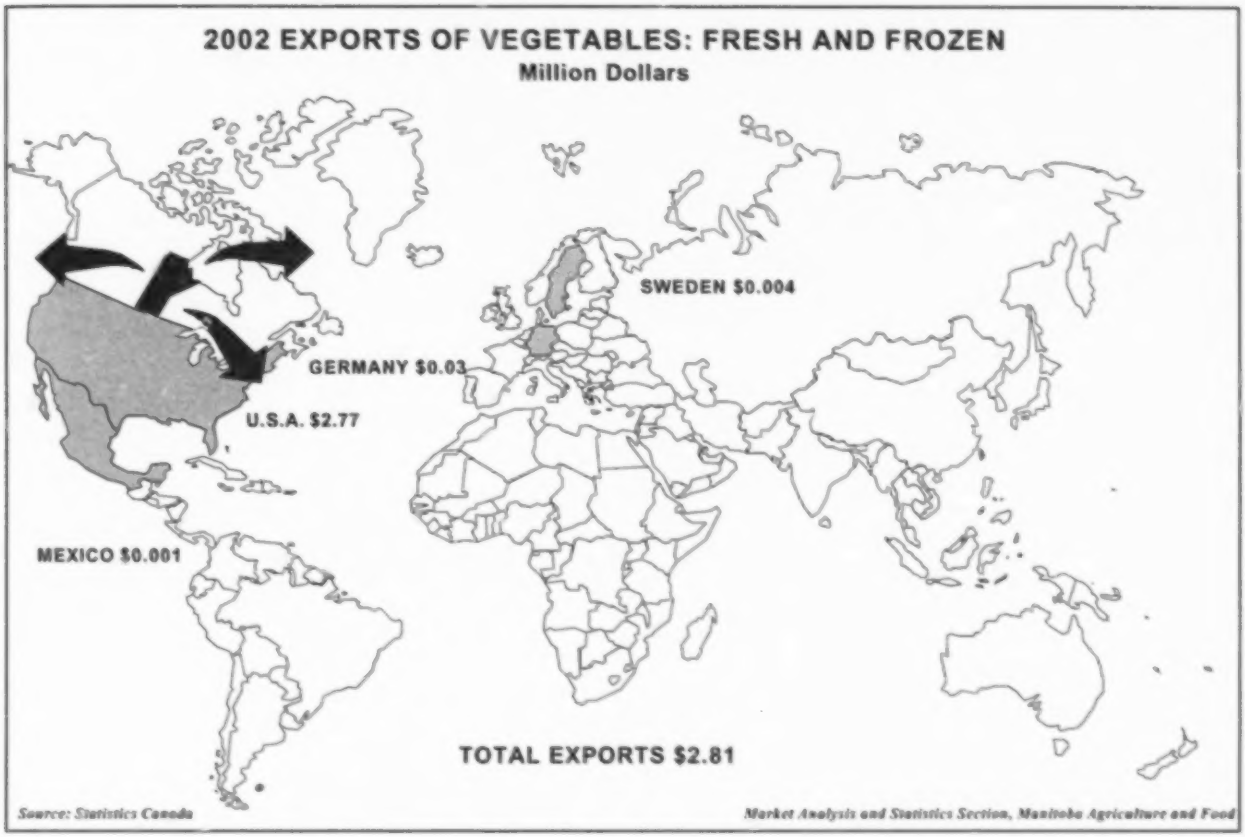


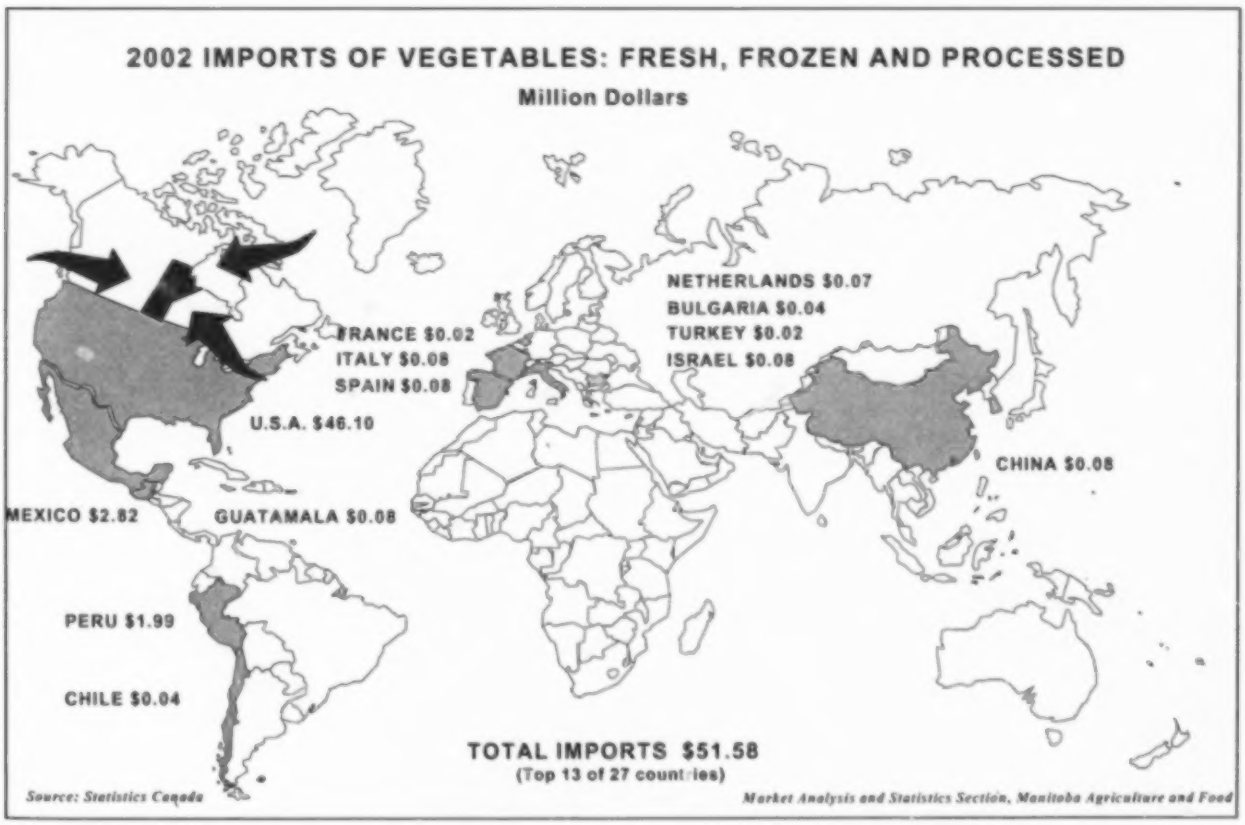
Data Source: Statistics Canada — Market Analysis and Statistics Section, Manitoba Agriculture and Food

FRESH/FROZEN/PROCESSED VEGETABLE IMPORTS BY TYPE, 2000- 2002



Data Source: Statistics Canada — Market Analysis and Statistics Section, Manitoba Agriculture and Food


2002 EXPORTS OF VEGETABLES: FRESH AND FROZEN
Million Dollars
SWEDEN $0.004
GERMANY $0.03
U.S.A. $2.77
MEXICO $0.001
TOTAL EXPORTS $2.81
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


2002 IMPORTS OF VEGETABLES: FRESH, FROZEN AND PROCESSED
Million Dollars
NETHERLANDS $0.07
BULGARIA $0.04
TURKEY $0.02
ISRAEL $0.08
FRANCE $0.02
ITALY $0.08
SPAIN $0.08
U.S.A. $46.10
CHINA $0.08
MEXICO $2.82
GUATAMALA $0.08
PERU $1.99
CHILE $0.04
TOTAL IMPORTS $51.58
(Top 13 of 27 countries)
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food